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David Sugarman

Financial Advisor

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PROFESSIONAL STAFF

[Alfredo E. Michael](#) (305) 347-2534 Registered Client Associate [View Profile](#)

PROFESSIONAL PROFILE

David has been in the financial services industry since 1997 when he started his career in New York City. David joined Merrill Lynch in 2009. The clientele David serves encompasses professional athletes, entertainers, their business managers, agents and families. He works tirelessly on developing strategies and solutions to help his clients meet their short- and long-term financial goals.

David's relationship with clients was developed after noticing many celebrity clients within a multitude of financial firms receiving poor advice by businessmen that did not hold them and their families in the right part of their mind.

First, David takes the time to listen to and review client financial situations, preferences and goals. Second, he offers recommendations for asset allocations to accurately reflect each clients income and growth expectations. He follows up discussions covering a wide range of opportunities, including investments, retirement, estate planning services and philanthropy. David's goal is to help clients maintain the same quality of life and standard of living during and after their professional careers by pursuing financial goals.

David is actively involved with many charities and sits on the executive board of Founders at Mt. Sinai Hospital as a Society Member.

Alfredo E. Michael, Registered Client Associate

Alfredo joined Merrill Lynch in 2008 in the Miami International office through the Global Wealth and Investment Management summer analyst program. He graduated from Florida International University in fall of 2008 with a Bachelor's Degree in Finance, a minor in Economics, and a Certificate in International Bank Management. Alfredo began his full-time career with Merrill Lynch in 2009 as a GWIM Analyst in the Coral Gables, FL office after being recruited through a nationally competitive internship program.

Alfredo holds a Series 7 and Series 66 registration. Originally from Caracas, Venezuela, He is fully bilingual in English and Spanish.

DIRECTIONS

Branch Office
701 BRICKELL AVENUE
MIAMI, FL 33131

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Address

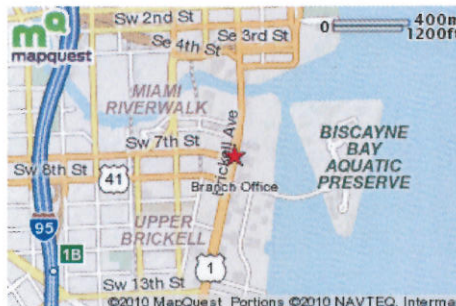
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Client Commitment

Our most deeply held principle at Merrill Lynch is that clients come first, and I am proud to be part of that tradition. To help you meet your financial objectives and build your wealth, I first listen to your personal goals, and then offer effective approaches to achieve them. At Merrill Lynch, I have unparalleled resources that include planning expertise, investment strategies and state-of-the-art technology designed to streamline any financial picture. Let me put them to work for you.

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